The Elements of User Onboarding

by Samuel Hulick
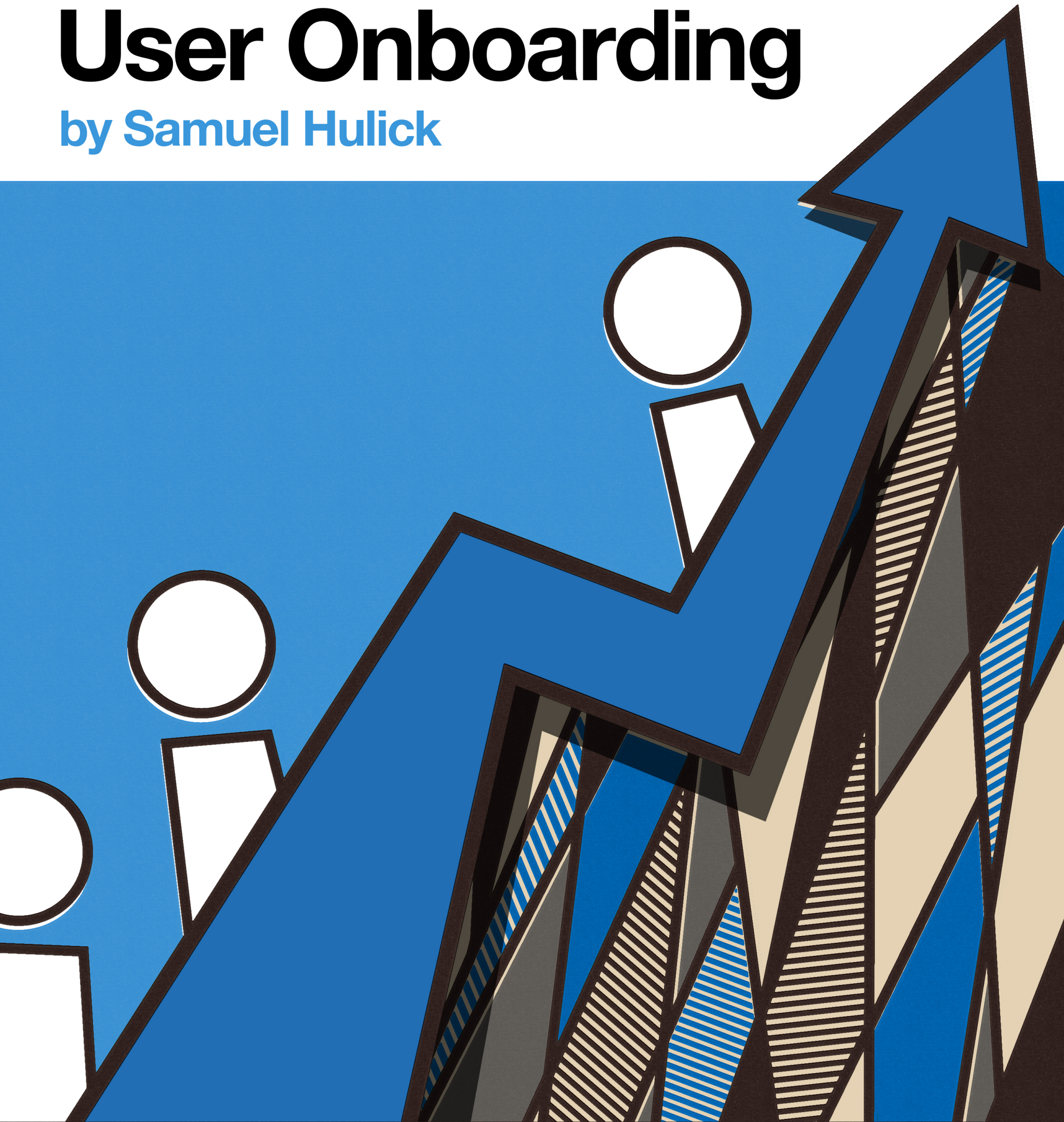
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Section 1

Crossing the (onboarding) chasm

Let's start at the end: There's a person that loves you.

They use your product constantly, almost religiously. They tell anyone who will listen how awesome it is at making one particular part of their life better. If you charge for it, they pay — and happily. If you don't, they unquestionably would if you did. They are the least likely to churn out, and the most likely to pull others in. They're one of the best friends your company could have: a thriving, successful user.

How did they get there? It's not like they were born that way. After all, there was a point not too long ago where *everyone on Earth* was a complete stranger to your product, that thriving user included. How

did they navigate their transformation from completely unfamiliar with your offering to intrigued, to exploring, committing, investing, and, ultimately, finding satisfaction on the other side?

That, in a nutshell, is what user onboarding is all about: guiding the uninitiated all the way to their own personal promised lands. While onboarding can't control how amazing your product is, it can sure as hell try to get as many people amazed with it as possible.

And yet, if you're reading this, you're probably not happy with the current percentage of those who become amaze-ees. How can you make sure even more strangers turn into thriving users? And while we're at it, what the heck is happening to all the ones that don't?

To answer those questions, let's turn the clock way, way back. All the way back before a user tries exploring your product, and even before they sign up for it - in fact, let's run things so far back that it's a point where the user hasn't yet even arrived on the scene: the time when the people in your company were hashing out all the decisions that would result in the way your product is adopted today.

For many organizations, those decisions were made by a combination of two groups: those focused on creating the thing your company offers, and those focused on driving tons of people to that thing. Or, as they're more commonly referred to, the Product department and the Marketing department.

Typically, the Marketing department's goals involve driving awareness, traffic, and signups, while the Product department is primarily beholden to creating new features & generating ongoing engagement.

Whether your revenue model's based on subscriptions, advertisements or "let's just make this thing really huge and figure it out later," chances are very good that getting as much of Marketing's traffic to become Product's engaged users is a very wise thing to do.

Marketing   Product
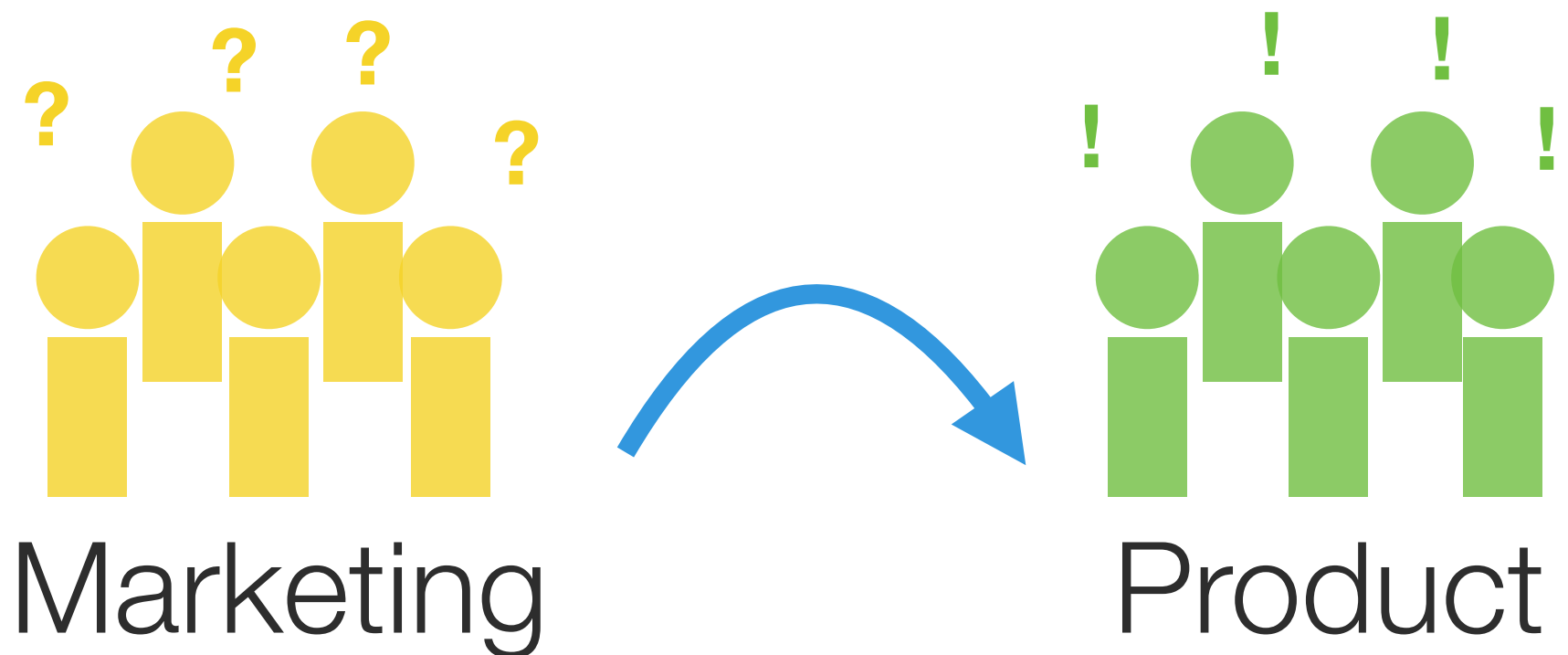
And yet, for many products out there, the road from stranger to thriving user is littered with corpses. A poor user onboarding experience means countless prospects are left on the table — prospects whose lives could have been significantly improved by your product, and who would have happily paid you for that improvement with their loyalty, referrals, and hard-earned money.
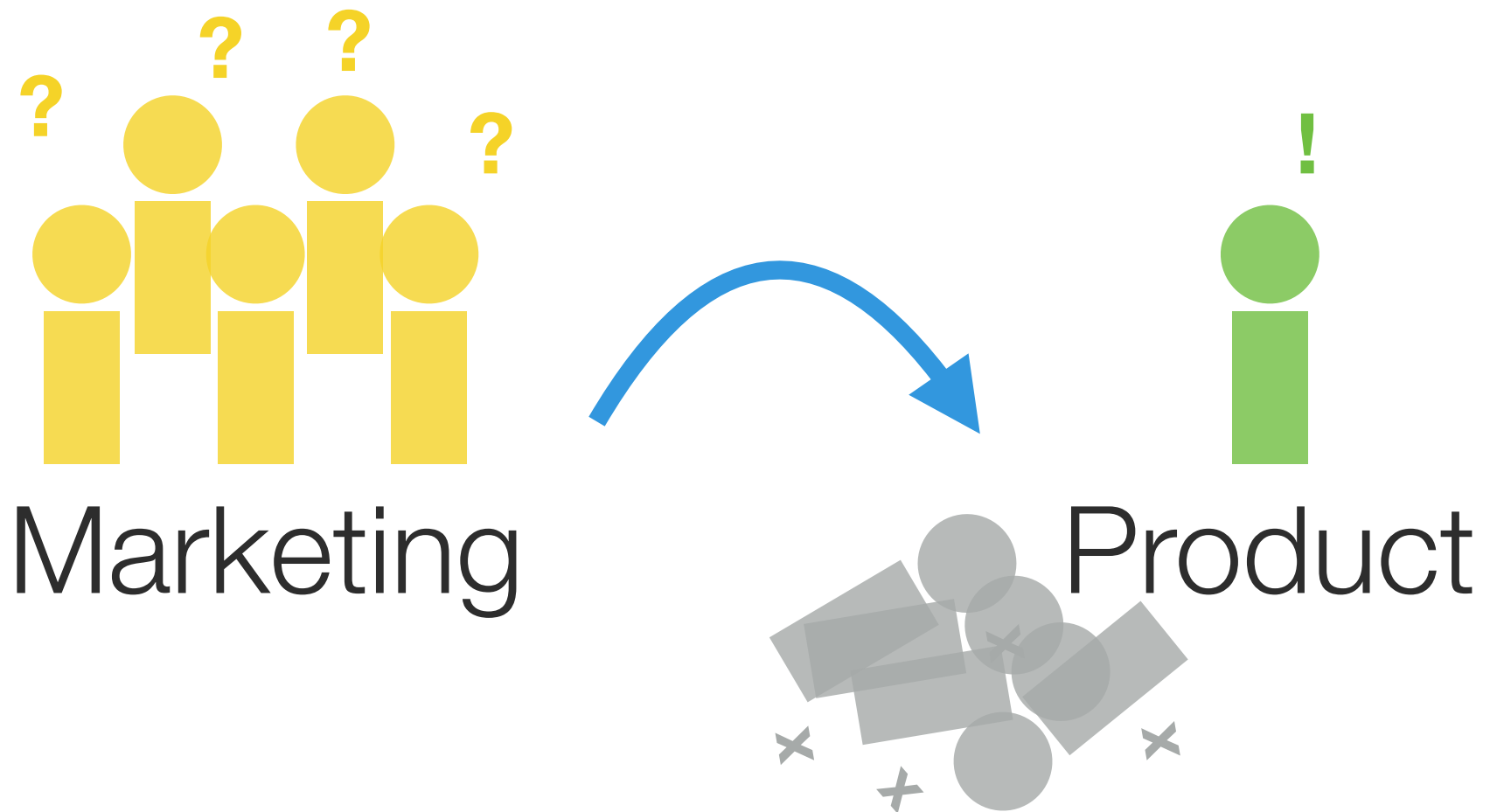
Marketing

Product

This sucks. It's a waste of time for the people trying to use your product, and it's a waste of resources for the people creating & marketing it.

It means you're burning advertising dollars on prospects that would otherwise be a sound investment, and it can lead to low retention rates even for those who do make it through. Factor in the extra support & sales costs to hand-hold an unnecessarily confused user base through your adoption process, as well, and it becomes clear just how much cash you're bleeding because of it.

If your company exists to change the world, crappy onboarding means it's changing a lot less of it than it could be. In that way, humanity is poorer for it. And as a business, your company is *literally* poorer for it.

So, let's fully explore that jump from stranger to thriving user, and set each moment of it up for outstanding levels of success. While every product will have its own unique progression, let's take a walk on the wild side and play fast & loose with some generalizations.

Here's a very generic outline of a usual customer journey:

Advanced use

Ongoing use

Purchase

Recurring use of product

First use of product

Sign up process

Introduced to product
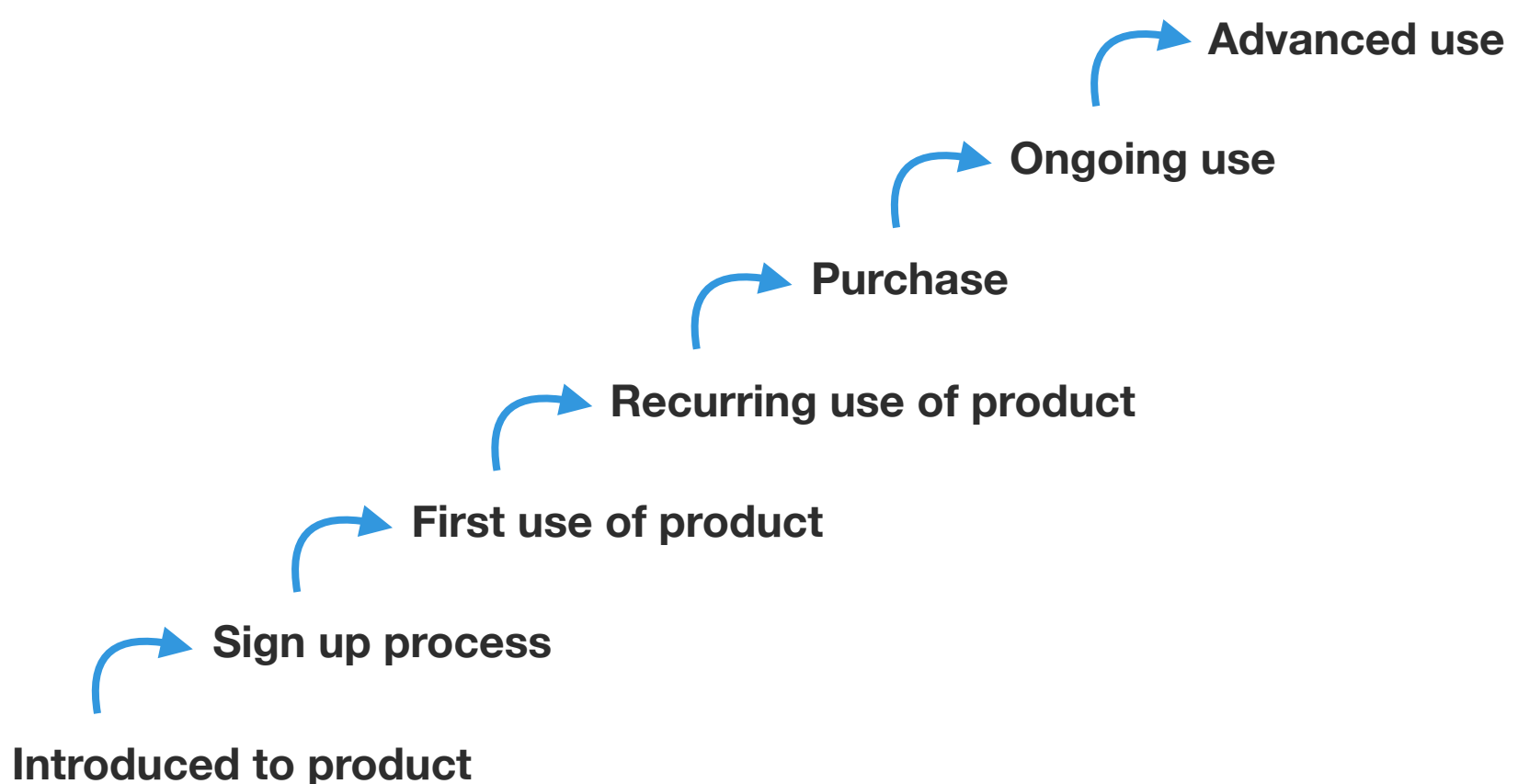
We will get into these steps in WAY more detail in their own time, but all we need to know right now is that more and more prospects are dropping off with each subsequent step, and that it's especially true for steps that aren't actively being managed.

Take a gander over each one, and think about who in your organization "owns" advancing users from that step to the next.

If yours looks something like this, you are definitely not alone:

Product!

Customer
Support??

→ **Advanced use**

→ **Ongoing use**

→ **Purchase**

→ **Recurring use of product**

→ **First use of product**

Sales??

→ **Sign up process**

Introduced to product

Marketing!

This is quite a gap to cover. Count in all the OTHER things the Product and Marketing departments have to worry about, and the likelihood of a kick-ass onboarding experience "just happening" approaches zero.

Wherever you happen to reside in your organization, bridging this gap will require serious dedication. If you aren't vigilant, you'll wind up dropping new users into the proverbial jungle with only a knife between their teeth, leading to few finding their way out unscathed.

Actually, an even better metaphor than a jungle is a steep, craggy mountainside, because this is a *climb* — you've got to overcome forces like apathy and distraction working against you every step of the way:
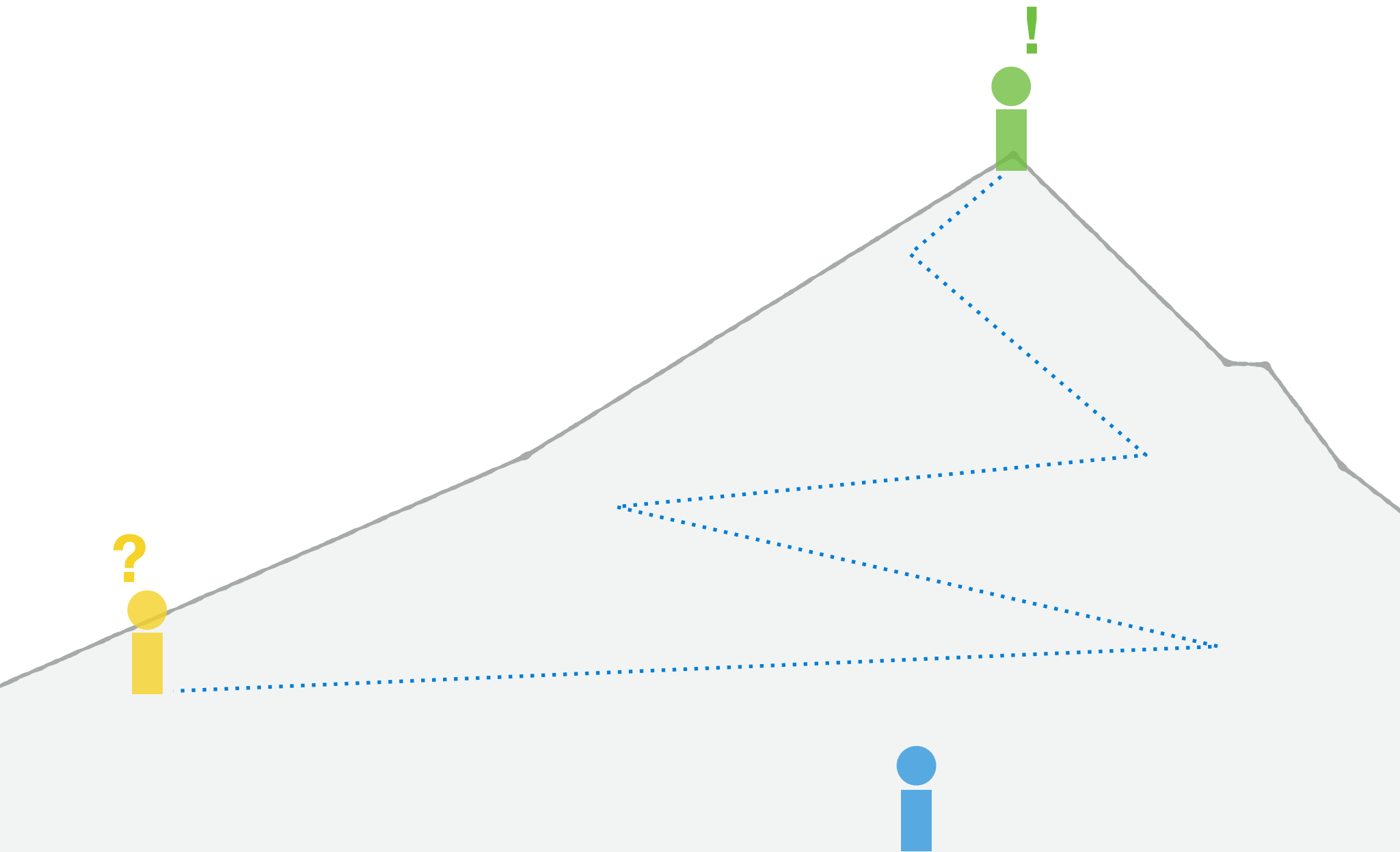
Fortunately for your users, though, they have **you** to help make that climb as painless as possible. By planning the easiest route, removing as many roadblocks as possible, and providing timely encouragement, you can "sherpa" them and your business to new heights.

So how *do* you plan out that route?

Chapter 1

Retracing Your Steps to Success

It's probably been a while since you signed up for your own product. In fact, I'd wager it's been a while since anyone at your company has (not counting QA, anyway).

You all eat, sleep, and breathe the value your software provides, and have explored every feature inside and out. You're the very definition of "power users". In fact, you probably know more about the space your product serves than most of your own clientele. What would ever compel you to go back through your earliest tutorials?

Well… yeah, exactly. I may be misquoting it a bit, but there's an old adage that goes something like "You are not your users, and you are

especially not them when they're first trying to figure out what the hell it is that your product does." *

Ironically enough, your product's first few impressions are SO make-or-break that you simply can't afford to evaluate them as the expert that you now are — you have to try to forget everything you know and come in with a totally fresh perspective. This is also known as the "turn yourself into the guy from Memento" strategy.**

In order to start retracing the steps, let's try going back to the top places someone might *first* find out about your company and then map out all the things they go through in becoming a highly-engaged user (and beyond).

For example, let's say your product is a SaaS offering for customer support, and cost-per-click ads are one of your primary acquisition channels (places where you get new users). Looking at your site traffic, you see that your Google AdWords conversions for "customer support knowledge base" is doing particularly well for you, bringing in tons of new signups every day.

* Not an actual adage.

** Not an actual strategy. Please do not attempt.

Super! Not only do you have a steady stream of prospects, but you know exactly where to go to find their introduction to your company — just do that search yourself!

Sure enough, searching for that term in Google turns up an ad for your site in the right-hand column.

The ad's link points to a landing page (a page designed for people to "land" upon… I know, right?!) with more information on the topic.

Easiest Knowledge Base Setup
www.yoursite.com/knowledge-base ▾
Turn your **customer support** into a valuable resource with a **knowledge base!** Easiest setup, guaranteed!
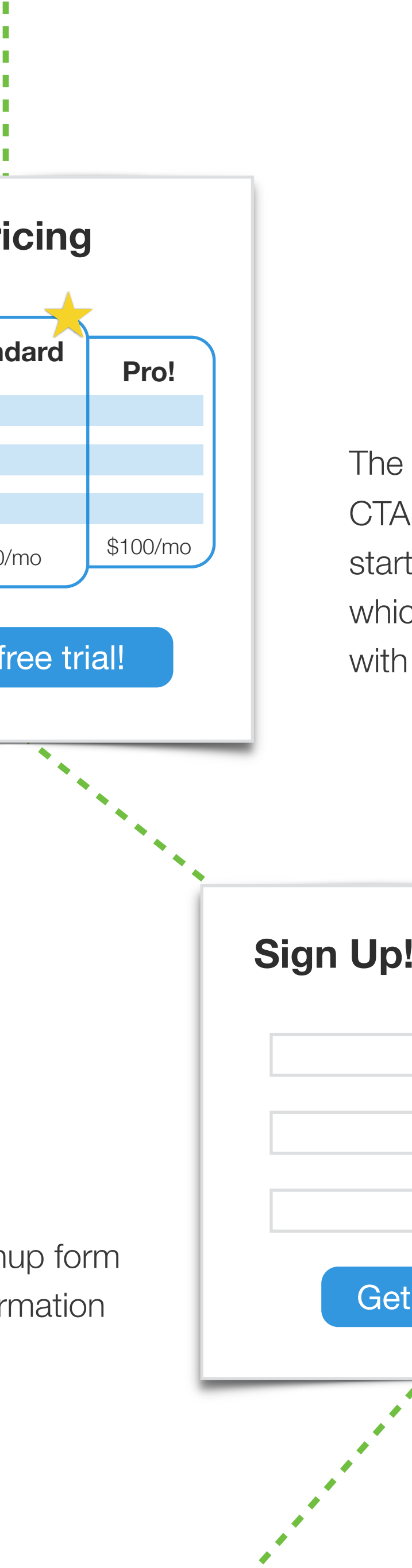
✔ **Super Easy Knowledge Base!**

If you're sick and tired of knowledge bases that are a total pain to set up, you should really think about giving ours a shot.

It's super EASY to set up!

Learn more!

At the bottom is a big button, which links to your pricing page.

Plans & Pricing

Rookie	Standard	Pro!
$20/mo	$40/mo	$100/mo

Start a free trial!

The pricing page has a CTA (call to action) for starting a free trial, which links to a page with a signup form.

Sign Up! Now!

Get Started!

In turn, the signup form triggers a confirmation email.

Confirm your address!

Click to confirm!

Either that or paste this into your browser or something:
http://yoursite.com/2903u2093429384-23841098

And just like that, you've outlined five key touchpoints (things that people interact with in relation to your product) for getting someone from square one all the way into your application!

Also, notice how two out of the five weren't even parts of the hypothetical website — the first was an advertisement, and the last was an email. Don't forget that your onboarding experience doesn't necessarily start or stay at YourCompany.com!

Keep going through the entire setup process, documenting every step that's either required (like confirming an email address) or seems super important for getting value out of the product (in this example, "adding your logo to your knowledge base" might be one). It's ok if things get a bit fuzzy as you go on — we're just trying to get the general shape of things.

PRO TIP

If you want a quick way to see all the pages your site makes available, go to Google and do a search for "site:yourdomain.com" (where "yourdomain.com" is, well, your domain) and it will show you everything it has indexed!

Once you've documented all the touchpoints for one end-to-end customer experience, go back and do the same thing for all the other top entry points. For example, if you've already documented the acquisition path for new Google AdWords users, go back and document how getting started is different for people who arrive via your "refer a friend" feature. Rinse and repeat!

AdWords ad

Pricing page

Email confirmation

Landing page

Signup form

Getting started
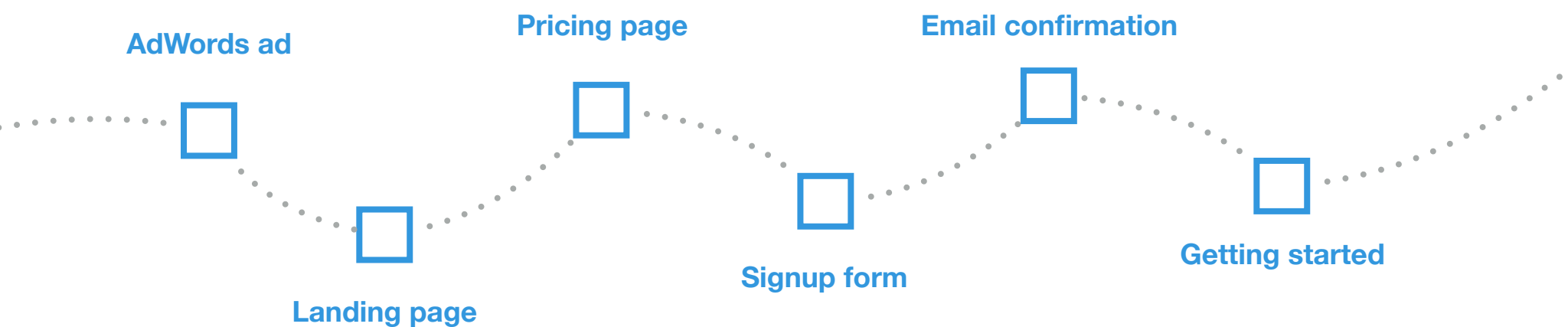
PRO TIP

While you're documenting all of the touchpoints, also evaluate them for consistency with each other. For example, did the description of the Google search result match up pretty well with the content of the landing page it pointed to? Be mindful of what your users are pursuing at each step, and help shape their expectations for the next one. UX pros call this "maintaining the scent of information."

Chapter 2

Making Better People

Alright! Now, that you've mapped out all the touchpoints in your *current* onboarding workflow, let's make like dreamers and imagine what your *ideal* one might look like.

When approaching this, it's really, **really** important to remember that people do not use software simply because they have tons of spare time and find clicking buttons enjoyable. They use software because it significantly improves their lives in some way.

For example…

Do people use Wistia because they enjoy embedding videos, or because they like being better at video marketing?

Do people use OKCupid because they like filling out personal profiles, or because they want to be better at dating?

Do people use Netflix because they enjoy streaming video, or because it makes them better at relaxing after a hard day?

In that sense, it's tremendously helpful to think of onboarding not in terms of activating features, but in terms of how your product makes its users successful. Put another way, you earn their engagement by making them *better people*, not simply by making a *better product*.

For that reason, your onboarding experience shouldn't be defined by the touchpoints you create, but instead by the *improvement* you provide. It's not about getting people from Point A to Point B in your app; it's about getting them from Point A to Point B in their *lives*: better video marketers, better daters, better relaxers. That's the recipe for loyal, ongoing engagement.

Take the time to get very clear on what kind of "better people" your product makes. It will inform everything that follows from here, so it's super important to get right.

Good definitions generally tend to be a single thing. If your definition includes multiple items, there's a fair chance you're simply listing your biggest features, and not the overall benefit they provide. That's

recursive thinking ("we make people better at using our app!"), which you want to avoid, big-time.

For example, a note-taking app like Evernote might say "we make people better at writing, storing, & searching for notes," but that's really just describing the use of the product. People might want to be better at those activities, but to what end?

Something like "we make people better at *remembering things*" could hit much closer to their users' main aspiration.

It can still be hard to separate out the benefit of using your product from the features you've created to accomplish it, but here's a litmus test that can really help keep the two straight:

Remember playing Super Mario Bros. as a kid, and seeing a fire flower pop up? You weren't excited because it had a green stem or because you could get it simply by walking over it — you were excited because once you got it, you could hurl fireballs!

PRO TIP

If your product's main benefit is entertainment instead of productivity, it still totally qualifies for this approach. Even the most "frivolous" games & social apps fulfill some otherwise-unmet human need. This is an equally-important part of being human, and one well worth crafting an onboarding experience around!

The product (the fire flower) and its characteristics (green stem, easy to pick up) were not the sources of excitement. That came from knowing how kick-ass you were going to be once you got it.

This isn't what your business makes

Person who's a
potential customer

Your product

Awesome person
who can do rad shit!
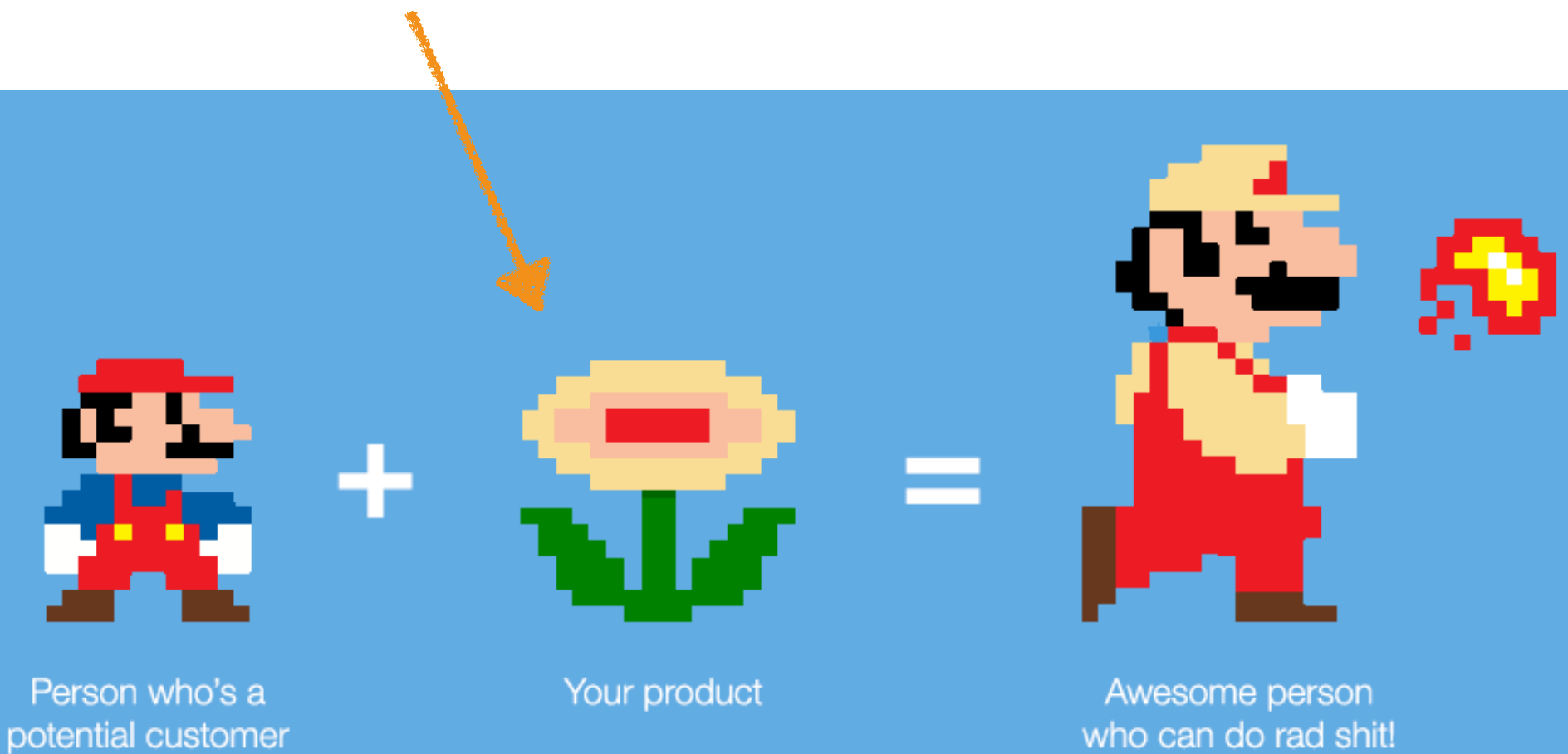
This is

You want your entire onboarding experience to be aligned around that kick-ass-ness. Every step along the way should help boost people towards the fireball-throwing beast they want to be. Look back on each of the touchpoints you noted in Chapter 1 — how do they measure up in that light?

While you're looking them over, also remember who's in the driver's seat at every turn: the user. Content and interfaces do not generate user actions, they simply *facilitate* it. It has to resonate with the intent the user's bringing to the experience.

Want a non-software analogy to illustrate the concept? I got your back!

Non-software analogy to illustrate the concept

> Let's say one of the cable giants messes up your bill, and you call their 800 number to correct it. You're presented with the inevitable "please listen carefully, as these options have changed" greeting, and are then told that pressing 1 can get you to Sales, 2 will go to Upgrades, and 3 will help you bundle additional services onto your plan.
>
> There isn't a person alive that would say "well, I came here because I've been overcharged, but yeah I guess it'd be pretty cool to add a landline, instead" — you want that billing problem fixed! The company could list all the things *they* want to happen until the cows come home, but they all might as well not exist unless one matches what *you* want to happen.

So it goes with web experiences — the user is in charge, and if the options you give them don't get them where they want to go, they won't be used. It only works if you first identify the intents, and then craft things to support them as fully as possible.

When you design for intents, you harness the only source of energy driving a web experience — the user's motivation to move forward. You make the pathways, but they're useless unless the users want to walk down them.

For each touchpoint, try to really put yourself in their situation — what's important to them at that particular time? What *just* happened that prompted them to start? Where do they hope to head next? What other information might they need?

It's kind of like designing in "3d" — you're not assessing touchpoints as items in isolation, but rather as a coordinated series of experiences, each propelling the user forward by serving their immediate interests. Beads on a necklace. Steps in a dance. Movements in a symphony.

And it ends with them becoming better people — the kind of people they want to be! How cool is that?
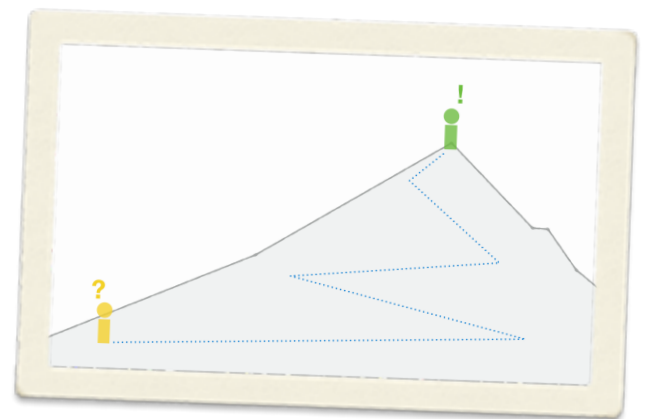
The whole rest of the book focuses on completely nailing the touchpoints of every major phase.

I'm excited. Are you? Let's do this!

Section 2

Helping your users envision their improvement

Remember that mountaintop we were helping people scale? The one where the super-awesome, improved version of themselves was at the top?

Well, there's kind of a problem. While our towering, Zeus-like perspective lets us see the entire onboarding pathway at once, the users in real life are mostly limited to going off of whatever screen they're seeing at that particular time. They might have a hazy idea of what could be coming next, but that's about it.

To complete our analogy, let's make it… like… a super cloudy day.

Hey, what the heck am I doing here?

?
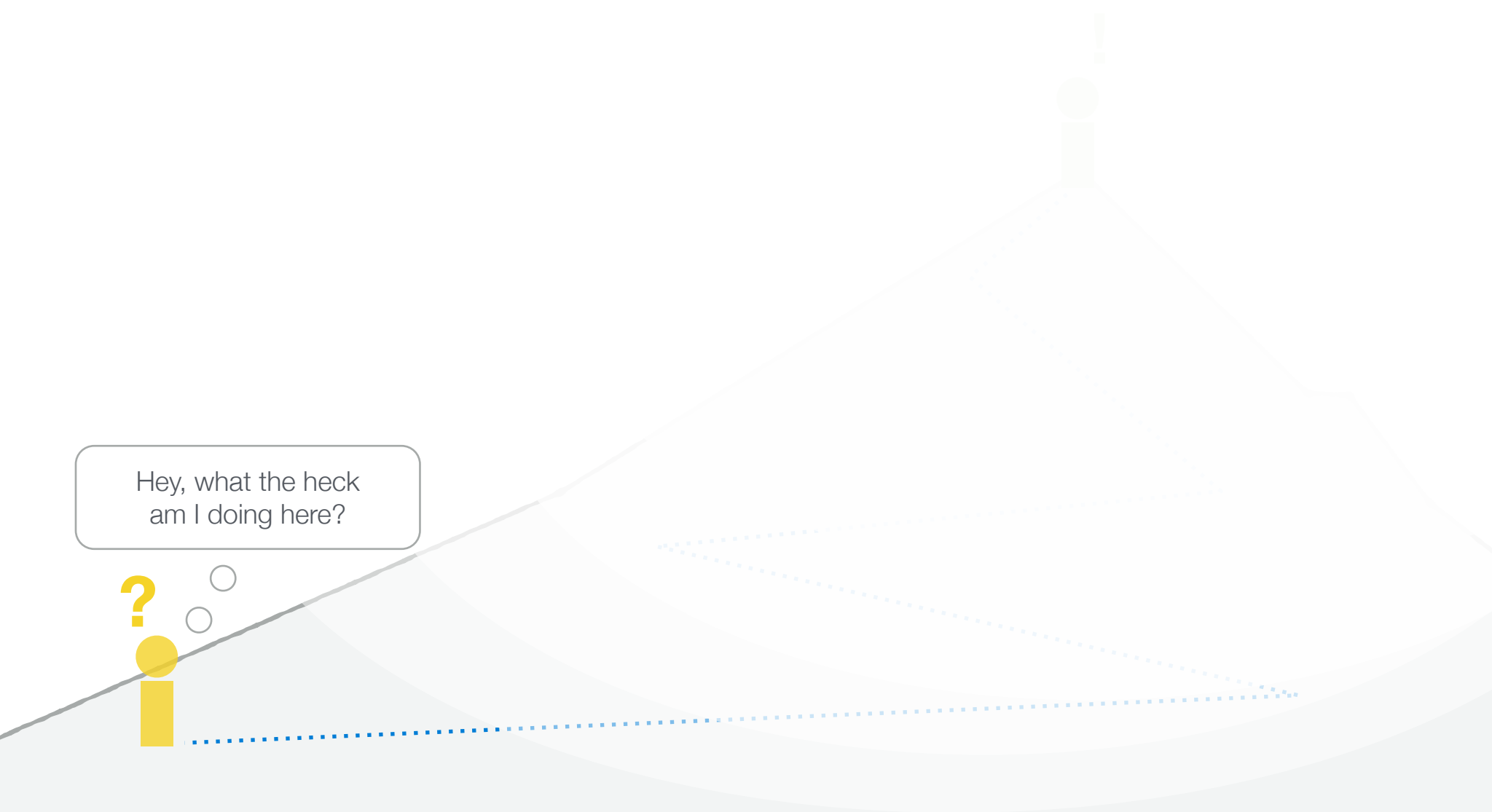
Of course, no one's going to start climbing a mountain without ample motivation for doing so, and that also goes for any onboarding experience — after all, even the breeziest ones take *some* effort, and no one goes through them just for funsies!*

* Present company excluded.

In order to get them to begin their ascent, you have to give them a good reason for doing so! Fortunately, you've already defined that "better version of themselves", and nothing motivates quite like self-interest.

Oh, I get it!

Our first move is to confidently and credibly tell them how much better things will be at the top, and use that promise as a motivator throughout the entire journey..

Let's get started.

Chapter 3

Selling the Dream

Let's start at the initial contact — the first time someone comes across something your company has created. It might be a search result, or a banner ad, a blog post, or your home page itself; whatever it is, this is your first impression, and you want it to be a good one!

These earliest touchpoints might typically be considered "marketing" and not "onboarding", but how successfully can you onboard someone when they start things off with a misaligned impression of the value your product provides? If your product offers bookkeeping help, but people are signing on thinking it's project management software, they're doomed from the start — no wizard or product tour can save that.

You've gotta plant that seed of future value consistently from the very earliest stages - not only for motivation, but for *orientation*, as well. To put it another way, think of onboarding as less of an *interface* problem and more of an *interpersonal* one. You're progressing a relationship, not just introducing a UI, and it's never too early to start!

Articulating your value clearly lets people know if this relationship will work for them or not right away, without having to muddle through a confusing experience to find out. It can also help lower churn (the percentage of your regulars who stop using your product) by quickly screening out the people who shouldn't be signing on to begin with.

It *also* lets you focus more of your time and resources around providing outstanding service to users who *should* be in there! It's a win-win for everybody!

So, how do you introduce yourself well? What key information do you need to provide to get them to take that first crucial step? This may come as a shock, but I've found that communicating in terms of how much better their life will become can be a pretty effective approach! That is to say, talk about them, not you.

PRO TIP

The VERY first impression someone has of your company could *easily* have occurred before they encountered anything you directly created. Word-of-mouth from friends or colleagues, a random comment on Twitter, getting mentioned in a news article, etc. Since you're not in total control of those, though, I'm leaving 'em out. That's not to say you shouldn't try to have some positive influence over how others describe you - you totally should! I just gotta draw the line somewhere, people!

Going back to the fire flower analogy, which page do you think would lead more people to click the "learn more" button?

This Thing Is Totally the Best

Recognizable by its patented green stalk, the Fire Flower™ is the latest in weaponized plumber technology.

Its patented Dual Leaf Composition™ provides an optimized method for consumption — to install, simply walk over its icon and setup is complete!

Learn more!

You Can Slay from Far Away!

Stop using your tiny, delicate body to duel with your foes — kill them with fireballs from long distance instead!

Our flower also makes you HUGE, so even if you're a little reckless, getting hit doesn't kill you — you just shrink back down and keep on rolling.

Learn more!

Might it perhaps be the one where it tells them they're about to become FREAKING AMAZING??

PRO TIP

> If you're thinking that describing things in user-centric terms can't apply to your company because it's B2B, sorry Kemosabe, but you're straight-up wrong. Every step of the way to purchase, there are humans — impressionable, self-interested humans — able to promote or hold back the sale. On top of that, it's incredibly easy to tie improvements directly to ROI when business is involved: who wouldn't want a salesman who's twice as effective at finding leads, or an administrative assistant who needs 6 fewer hours per week to order lunches?

People want to know how your product will be a meaningful addition to their lives. Establishing your product's value in its attributes (features, performance, etc.) forces people to piece that meaning together themselves. That's tedious for them and risky for you — how do you know their interpretation will be accurate? When you instead talk in improvements, you're handing them a complete picture, not a puzzle to put together.

Think of your entire onboarding experience as a heroic story, with your user as the star. You know how awesome Daniel-san was at the end of Karate Kid? Raised up high on cheering shoulders, trophy proudly held aloft, his crane kick having vanquished his hated rival? You lead with that.

Apologies to Mr. Miyagi, but you do not lead with "wax the cars and sand the decks, and then we'll see what happens." You start with the end (kind of like this book did!). This is the hook that will pull your users all the way through the p.i.t.a. they're about to subject themselves to.

This is the narrative thread that must be woven into every touchpoint in your onboarding experience. This is the dream you're selling.

That said, you don't want to go full "khakis & laptop on a tropical beach dream" on them. That's way too vague. This isn't about selling something as generic as "the good life," it's about holding up a mirror to your users and showing them an improved version of themselves,

in one clear and specific way — the way your product helps them.

Also, don't shy away from being comprehensive in articulating that improvement. You don't want to blindly follow the lead of the Twitters, Facebooks, and LinkedIns of the world, with their spartan pre-signup touchpoints. They have the enviable position of presuming most everyone who comes their way already knows what they offer. Unless you're truly a household name, that's a very risky assumption to make.

I know, I know, they're wildly successful. It's hard to ignore out of hand *any* approach they're taking. Fortunately, you don't have to take my word for it! Josh Elman played a large role in growing the user bases of *record scratch* *every single one* of those companies! Hear what he has to say:

> "Most people have heard of Twitter, so we get the luxury of having a blank home page that just says 'sign up' — I actually don't encourage this for most sites early in their stages, because most people who come to your sites have no frickin' clue, and they're not just gonna sign up without some rationale. Just be careful not to copy the people who are much, much larger." — Josh Elman

Of course, the comprehensive description of your product need not be limited to the home page alone. As mentioned before, landing pages can do an absolutely terrific job of rounding out the full picture, particularly by focusing in on one specific aspect geared towards one specific user segment.

Landing pages also thrive when you need to quickly throw something up there and see how it performs. They're ideal for rapidly testing theories about how to describe the value you provide, and in that sense are kind of the pawns of the product design "chess match" — they're cheap, numerous, and relatively disposable.

If you're finding difficulty in getting lots of landing pages up, Unbounce has created an amazing product for doing so not only quickly, but totally without the need to tie up engineering resources. If you pair them up with Crazy Egg, you can really ramp up your feedback loop, which will turn your landing pages into heat-seeking missiles of mutual success. I highly recommend them both!

Either way, take a look at all your touchpoints, especially the introductory ones — are they promising an improvement? Are they announcing super powers, or just describing features?

At every step, you want them selling the dream as comprehensively, accurately, and persuasively as possible. But even that is not enough on its own — in order for them to take that leap, they have to first believe it will actually get them to where they want to go.

Where do you want to go with YOUR onboarding?

That's it for the sample, but there's a TON more to check out.

Ever wanted to know how to…
• unlock a new user's "aha moment"?
• get people to stop using a competitor's product?
• provide a first five minutes that gets users to stick?
• set the stage for the #1 thing every new signup should do?
• implement the right design patterns for your own onboarding?

… and, like, a million other expert tips for mastering User Onboarding?
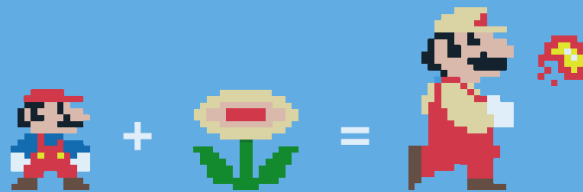
Keep Reading and Level Up

(^^ includes a discount for 15% off because you do your homework ^^)

"So far we've increased trial conversion by 2%, which means **several hundred thousand dollars annually** for the business. In terms of ROI, two hours reading this book is **one of the most important investments I've made** as a founder."

-- Nick Francis, Co-Founder, Help Scout